

Meeting Planner Guide

Pre-planning

The Basics:

- *What is your meeting's objective or purpose? (Seminar, Training Course, Departmental Staff Meetings, Executive Board Retreats)
- *What is the size of your group? What special needs and interests might your attendees have? Age?
- *What are your meeting dates? (Keep in mind other organizational events and holidays.)
- *Are your dates flexible? (Arrival/Departure Pattern)
- *Are you giving yourself plenty of lead time?

The Structure:

- *Develop your agenda. (General Session, Overall attendance, seating set up, starting and ending times, audio-visual needs)
- *Decide upon your food and beverage requirements, as well as times. (Meals and refreshment breaks.)
- *Identify any transportation needs.
- *Determine recreation, team building and/or entertainment.
- *Prepare your timeline for meeting communication. (Meeting announcement, event promotion, registration, name badges and creation of meeting materials)
- *Cost out participants expenses.
- *Identify speaker needs.

Budgeting

The Cost:

- *Which expenses will be absorbed by the organization or the participant?
- *Develop expense ledger for meeting. (labor, marketing expenses, transportation, lodging costs, food and beverage cost, recreation and entertainment cost, taxes, gratuities, and service charges, audiovisual charges, speakers fees, printing costs, and miscellaneous supplies.
- *Buffer a fund for unexpected expenses.
- *Determine expenses for any applicable licenses and insurance.
- *Cross reference your budget with your organizations existing accounting policies.
- *Verify that funds are available for expenses.

Booking Your Meeting

The Selection:

- *Consider a convenient location based on participant travel time.
- *Be mindful of in-season and out-of-season rates.
- *Determine the type and number of lodging rooms needed.
- *Detail the amount and size of meeting rooms required.
- *Consider available extracurricular activities.

The RFP:

- *Include dates. (Any flexible dates that may be applicable)
- *Detail the lodging room numbers and specifics.
- *Present meeting room needs. (Square footage needed #of breakout rooms, internet capabilities, and special needs.)
- *Include budget requirements or bottom line costs for lodging and meeting rooms.
- *Establish needs for meals and refreshment breaks. (What type and the times they are needed)
- *List any special needs. (Display tables, stage, work stations, etc.)

The Tour:

- *Inspect the website closely. (Layouts, pictures, meeting schematics)
- *Contact the site for materials. (Facility descriptions, city maps, transportation information, etc.)
- *Schedule site tour with the onsite contact.